McKinsey&Company

McKinsey Quarterly

2013 Number 4

本书编委会 组编

大数据：你的规划是什么？

封面故事：

激活C级高管：夯实大数据分析

构建数据驱动战略：三大关键

揭开大数据神秘面纱：以本土保险业为例



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[illegible]Dominic Barton[illegible]David Court[illegible]

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[illegible]MGI[illegible]MGI[illegible]1990[illegible]MGI[illegible]20[illegible]30[illegible]MGI[illegible]

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Nicolas Leung[illegible]
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Michael Chui[illegible]Martin Dewhurst[illegible]Lindsay Pollak

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Wichmann 1.4

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Roxane Divol James Manyika

Michael Chui MGI

Martin Dewhurst

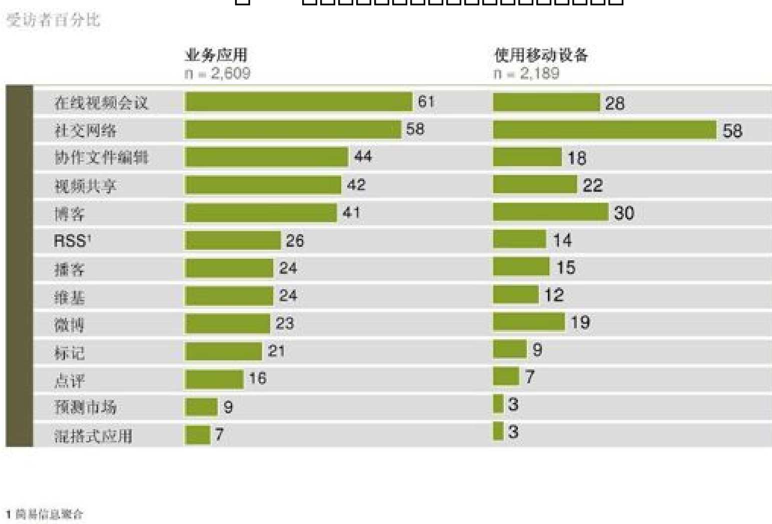
Lindsay Pollak

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Jacques Bughin[illegible]Michael Chui[illegible]Lindsay Pollak

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受访者百分比
业务应用
n = 2,609
使用移动设备
n = 2,189
在线视频会议 61 28
社交网络 58 58
协作文件编辑 44 18
视频共享 42 22
博客 41 30
RSS¹ 26 14
播客 24 15
维基 24 12
微博 23 19
标记 21 9
点评 16 7
预测市场 9 3
混搭式应用 7 3
1 简易信息聚合

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2013[illegible]3[illegible]4[illegible]

[illegible]2 1/5[illegible]


受访者百分比¹
组织类型分布
发展中
内部互联
外部互联
完全互联
2013, n = 2,189
48
12
20
20
2012, n = 2,560
49
13
17
20
2011, n = 3,103
78
7
12
3
2010, n = 2,174
79
13
5
4
1 由于采用了四舍五入法，数据总和可能不等于100%

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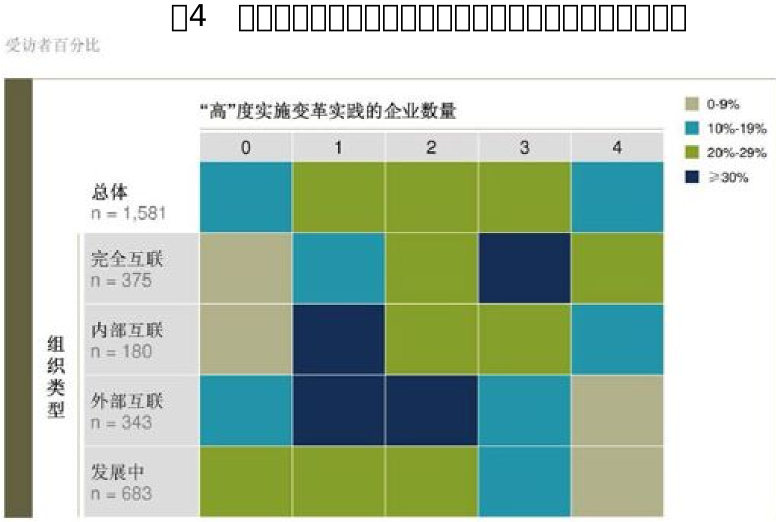
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受访者百分比[1]
组织变革实践在受访者企业的实施程度（根据组织类型划分）
变革实践
高 中 低 无
利用系统和组织结构强化变革
应用技术的榜样
培育社交技术的能力
加强对变革的认识和承诺
完全互联 46 42 12 0 | 13 52 30 6 | 11 42 44 3 | 10 36 42 12
内部互联 28 46 24 2 | 5 47 36 12 | 4 27 62 7 | 1 24 32 44
外部互联 30 41 22 6 | 6 38 45 11 | 4 19 63 14 | 3 30 30 38
发展中 19 35 35 10 | 7 30 37 26 | 5 23 49 22 | 2 18 35 45
1 由于采用了四舍五入法，数据总和可能不等于100%

[illegible]


受访者百分比
"高"度实施变革实践的企业数量
0 1 2 3 4
0-9%
10%-19%
20%-29%
≥30%
总体 n = 1,581
完全互联 n = 375
内部互联 n = 180
外部互联 n = 343
发展中 n = 683
组织类型

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[illegible]

[illegible]Jacques Bughin[illegible]

[illegible]Michael Chui[illegible]

[illegible]Lindsay Pollak[illegible]

[illegible]

Jonathan Woetzel[illegible]Shannon Bouton[illegible]David Cis

[illegible]“[illegible]”[illegible]

[illegible]36[illegible]2030[illegible]50[illegible]“[illegible]”[illegible]

[illegible]

[illegible]“[illegible]Cities Special Initiative[illegible]”[illegible]“[illegible]”[illegible]

[illegible]——[illegible]“[illegible]”[illegible]“[illegible]”[illegible]

[illegible]“[illegible]”[illegible]“[illegible]”[illegible]

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“巧增长”	花小钱办大事	赢得改革支持
树立战略高度	严格评估和管理支出	打造个人愿景
规划改革	寻求各方合作	组建高绩效团队
环境考量	引入投资问责制	创建问责文化
坚持机会均等	拥抱新技术	达成利益相关方共识



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□□2007□□□□□□□□□□□□□□□□□□□□□□□□30%□□□7%□□8□□□□□□5000□□□□□□7440□□□□□□□□□□□□□□□□□□□□□□□□□□□□□10□□□□□□□□□□□3700□□□□□□5510□□□□□

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[illegible]Michael Bloomberg[illegible]“[illegible]CEO”[illegible]24[illegible]3-1-1[illegible]

[illegible]Boris Johnson[illegible]Johnson[illegible]

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http[illegible]//www.mckinsey.com/insights/urbanization/how_to_make_a_city_great

Jonathan Woetzel[illegible]MGI[illegible]

Shannon Bouton[illegible]“[illegible]”[illegible]

David Cis[illegible]

B2B[illegible]

Tjark Freundt[illegible]Philipp Hillenbrand[illegible]Sascha Lehmann

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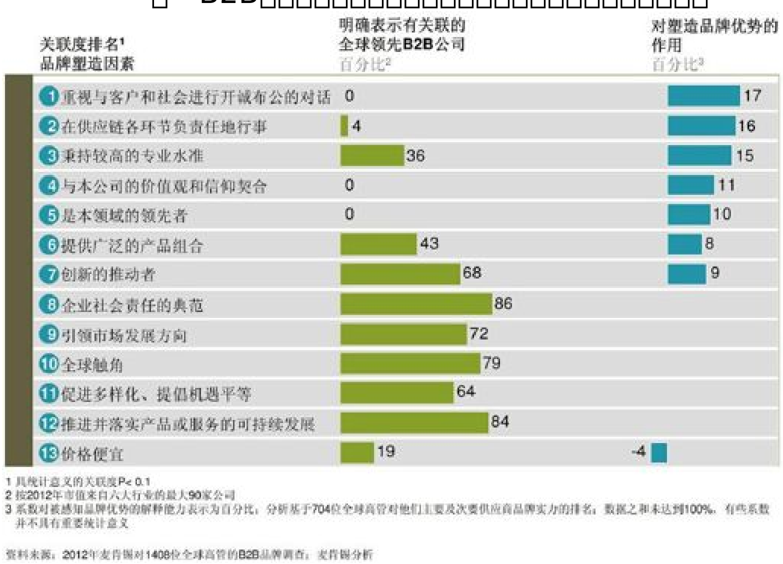
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[illegible]500[illegible]DAX30[illegible]13[illegible]“[illegible]”[illegible]90[illegible]B2B[illegible]13[illegible]3[illegible]90[illegible]10[illegible]

[illegible]700[illegible]

[illegible]B2B[illegible]B2B[illegible]90[illegible]B2B[illegible]B2B[illegible]

[illegible] B2B[illegible]



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[illegible]IBM[illegible]Smarter Planet[illegible]

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[illegible]Hilti[illegible]

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[illegible]DHL[illegible]

[illegible]Open Forum[illegible]

[illegible]Agnes Claye[illegible]Blair Crawford[illegible]Jeff Jacobs[illegible]

Tjark Freundt[illegible]

Sascha Lehmann[illegible]

Philipp Hillenbrand[illegible]


在传统的精益思维基础上提高资源效率
运用理论限额设定更高目标
利润作为最终决策的主要因素优先处理
全体员工参与实现持续变革
从长期效益考量资源的获取和循环
精益
理念
理论
极限
时效
利润
三圈
联动
长效
循环
利用精益原则和企业现有精益专长制定资源效率战略。精益与绿色思维具备高度协同性且使用相同的基本原则。
运用理论极限概念制定倡导创造性思维和实现资源效率重大改善的目标。
实施资源效率变革时考察利润率公式（收入减成本）。采取协同方式权衡（产量、产出率、能源和排放）。
对企业的管理体制以及理念和行为实施必要的提升。
将先期的科学决策视为长期竞争力的前提。
资料来源：麦肯锡分析

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Emmanuel Pitsilis[illegible]

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[illegible]2006[illegible]52%[illegible]2011[illegible]39%[illegible]2021[illegible]25%[illegible]2006[illegible]37%[illegible]25%[illegible]65%[illegible]2021[illegible]77%[illegible]

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Emmanuel Pitsilis[illegible]

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Stefan Biesdorf[illegible]David Court[illegible]Paul Willmott

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1 代码升级指的是将患者的治疗升级到报销费率较高的医保代码的做法

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Stefan Biesdorf[illegible]

David Court[illegible]

Paul Willmott[illegible]

1.[illegible]Dominic Barton[illegible]David Court[illegible]“Making advanced analytics work for you”[illegible]Harvard Business Review[illegible]2012[illegible]10[illegible]90[illegible]10[illegible]78-83[illegible]

2.[illegible]

3.[illegible]

4.[illegible]Sven Smit[illegible]Lowell Bryan[illegible]Chris Bradley[illegible]“Managing the strategy journey”[illegible]mckinsey.com[illegible]2012[illegible]7[illegible]

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Brad Brown□David Court□Paul Willmott



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[illegible]Matthew Ariker[illegible]Amit Garg[illegible]Joshua Goff[illegible]Lori Sherer[illegible]Isaac Townsend[illegible]

Brad Brown[illegible]

David Court[illegible]

Paul Willmott[illegible]

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Sociological Review”□2004□□□69□□□3□□□345-64□□

2.□□Dominic Barton□David Court□□“Making advanced analytics work for you”□“Harvard Business Review”□2012□□□90□□□10□□□79-83□□□□David Court□Frank Comes□□□“Putting big data and analytics to work”□2012□9□□mckinsey.com.

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Dominic Barton[illegible]David Court

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[illegible]20[illegible]90[illegible]

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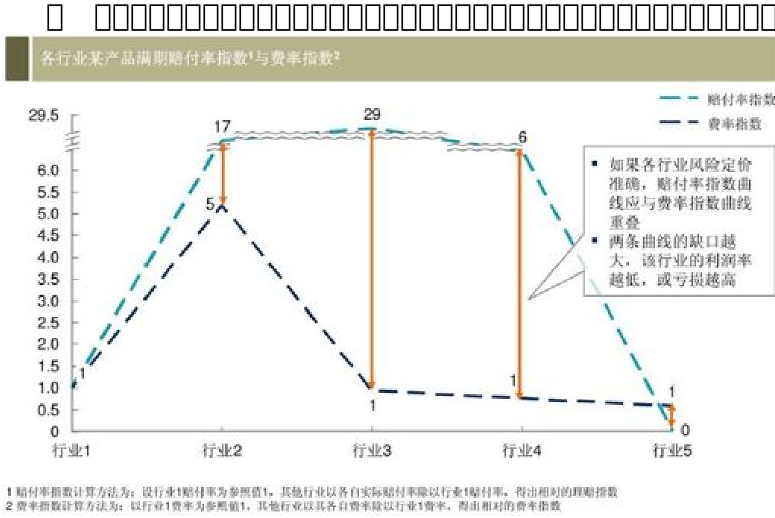
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Dominic Barton[illegible]

David Court[illegible]





各行业某产品满期赔付率指数1与费率指数2
赔付率指数
费率指数
29.5
6.0
5.5
5.0
4.5
4.0
3.5
3.0
2.5
2.0
1.5
1.0
0.5
0
17
29
6
5
1
1
1
1
0
行业1
行业2
行业3
行业4
行业5
如果各行业风险定价准确，赔付率指数曲线应与费率指数曲线重叠
两条曲线的缺口越大，该行业的利润率越低，或亏损越高
1 赔付率指数计算方法为：设行业1赔付率为参照值1，其他行业以各自实际赔付率除以行业1赔付率，得出相对的理赔指数
2 费率指数计算方法为：以行业1费率为参照值1，其他行业以其各自费率除以行业1费率，得出相对的费率指数

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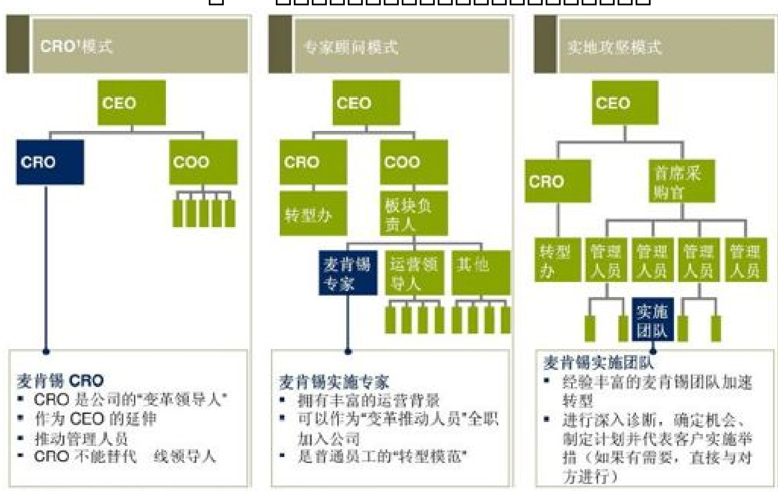
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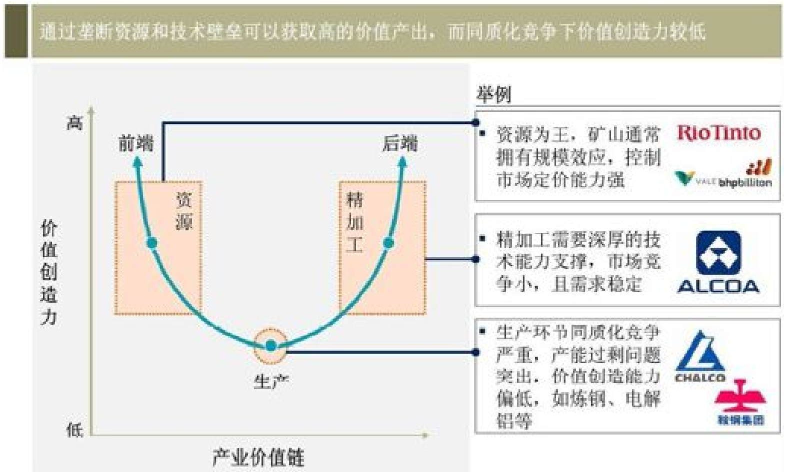
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2.□□□□□□□□□
3.□□□□□□□□□
4.□□□□□□□□□
5.□□□□□“□□□□□”
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1 首席重组官，只要保留使命、权力和变革推动者的元素，也可以使用其他

□2　□□□□□□□□□□□□□□□□□□“□□□□”□□□□□□□□□□


通过垄断资源和技术壁垒可以获取高的价值产出，而同质化竞争下价值创造力较低
举例
高
低
价值创造力
前端
后端
资源
精加工
生产
产业价值链
资源为王，矿山通常拥有规模效应，控制市场定价能力强
RioTinto
VALE
bhpbilliton
精加工需要深厚的技术能力支撑，市场竞争小，且需求稳定
ALCOA
生产环节同质化竞争严重，产能过剩问题突出，价值创造能力偏低，如炼钢、电解铝等
CHALCO
鞍钢集团

资料来源：麦肯锡分析

[illegible]

[illegible]1 “[illegible]”

[illegible]

[illegible]2 “[illegible]”

[illegible]“[illegible]”[illegible]“[illegible]”[illegible]“[illegible]”[illegible]

[illegible]3 “[illegible]”

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“[illegible]”[illegible]“[illegible]”[illegible]“[illegible]”[illegible]“[illegible]”[illegible]

[illegible]

[illegible]“[illegible]”[illegible]

[illegible]LTO[illegible]

[illegible]

[illegible]“[illegible]”[illegible]“[illegible]”[illegible]

[illegible]3[illegible]35%[illegible]2015[illegible]

[illegible]50[illegible]“[illegible]”[illegible]3[illegible]

[illegible]3 [illegible]A[illegible]X[illegible]



资料来源：麦肯锡分析

[illegible]“[illegible]”[illegible]“[illegible]”[illegible]

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（2[illegible]10%[illegible]

（3[illegible]

（4[illegible]

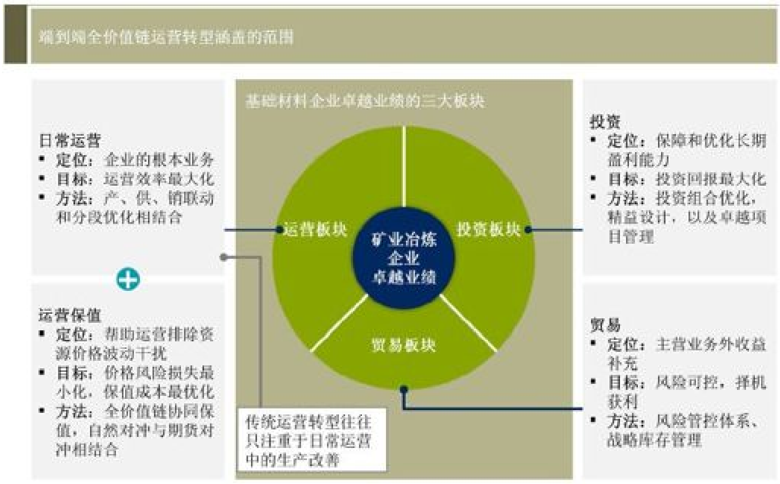
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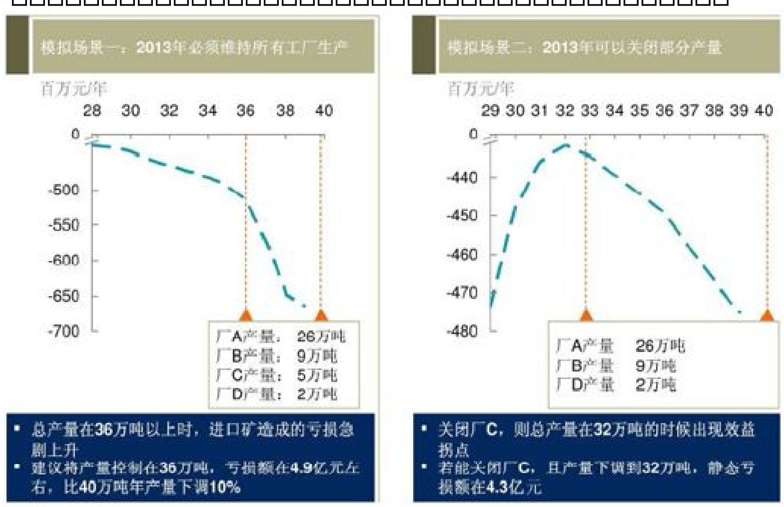
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[illegible]“[illegible]”[illegible]4[illegible]

[illegible]4 [illegible]



资料来源：麦肯锡分析



资料来源：麦肯锡分析

[illegible]“[illegible]”[illegible]

[illegible]

[illegible]“[illegible]”[illegible]

[illegible]30[illegible]——[illegible]2/3[illegible]

[illegible]

[illegible]“[illegible]”[illegible]DNA[illegible]

[illegible]“[illegible]”[illegible]“[illegible]”[illegible]①[illegible]“[illegible]”[illegible]②[illegible]

[illegible]PMO[illegible]CRO[illegible]“[illegible]”[illegible]

[illegible]“[illegible]”[illegible]“[illegible]”[illegible]“[illegible]”[illegible]

[illegible]“[illegible]”[illegible]“[illegible]”[illegible]/[illegible]

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[illegible]1966[illegible]2012-2013[illegible]

[illegible]2012[illegible]

[illegible]

■[illegible]“[illegible]”[illegible]“[illegible]”[illegible]

■[illegible]

■[illegible]

■[illegible]

[illegible]

[illegible]2013[illegible]1100[illegible]5000[illegible]

[illegible]

[illegible]

[illegible]

[illegible]

[illegible]

[illegible]

[illegible]

[illegible]


WELCOME TO
INTERNET BANKING
PERSONAL ID
YOUR PASSWORD
ENTER

[illegible]

■[illegible]“[illegible]”[illegible]

■[illegible]2012[illegible]2020[illegible]80[illegible]

■[illegible]/[illegible]/[illegible]

■[illegible]

■[illegible]

[illegible]2012[illegible]3[illegible]

[illegible]

[illegible]15[illegible]2013[illegible]2010[illegible]70[illegible]2010[illegible]1.38%[illegible]2013[illegible]2.11%[illegible]2010[illegible]2.5%[illegible]2013[illegible]4.3%[illegible]6[illegible]12[illegible]50[illegible]

[illegible]“[illegible]”[illegible]

[illegible]2013[illegible]24.7[illegible]103%[illegible]5.7[illegible]14.3%[illegible]

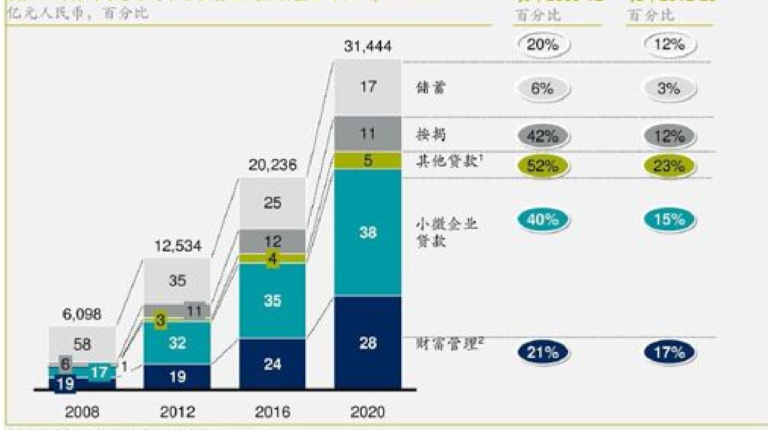
[illegible]5[illegible]“[illegible]”[illegible]2005[illegible]73%[illegible]2010[illegible]60%[illegible]2015[illegible]55%[illegible]2011[illegible]50%-60%[illegible]50[illegible]30%-40%[illegible]100[illegible]25%[illegible]5[illegible]

“[illegible]”



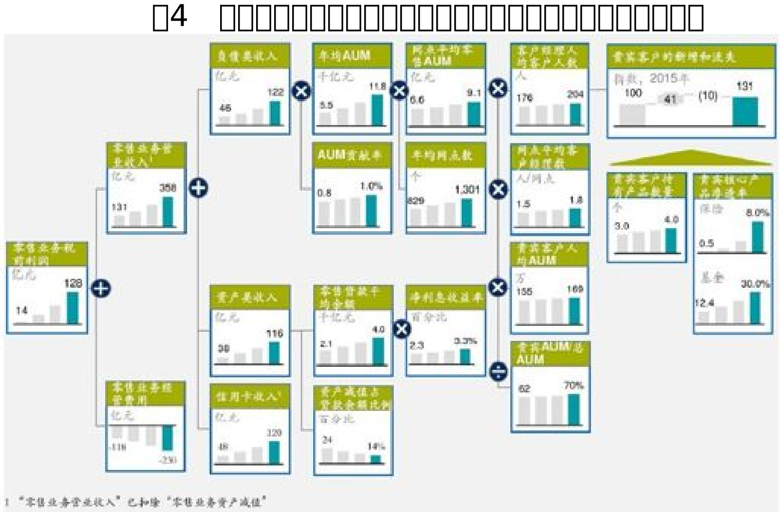
中国银行业的客户资产回报率（ROA）
占客户资产的比例，百分比
银行总体
零售银行
2012
2020
2012
2020
净利息收入
3.3
2.4
4.7
2.8
中间业务收入
0.7
1.1
1.9
2.2
运营费用
1.7
1.8
4.1
3.3
风险调整后的客户资产回报率
2.3
1.7
2.5
1.7
成本收入比
38%
41%
58%
60%
资料来源：麦肯锡全球银行利润池模型（2013年9月更新）

按产品计算的零售银行和小微贷款风险调整后的收入，2008-20
亿元人民币，百分比



1 包括信用卡、无抵押个人贷款和汽车贷款
2 包括结构性储蓄，共同基金，银保和其他仅收费的产品
资料来源：麦肯锡全球银行利润池模型（2013年9月更新）


战略
业务体系和平台
组织执行力
1 战略：清晰的战略和细化实施路径
2 共识：卓越的沟通和共同的战略愿景
3 体系：产品、营销、销售服务和渠道体系
4 平台：卓越的运营和IT系统平台
5 架构：优化的条线化架构和清晰的考核导向
6 团队：专业化、高素质的总分行团队
7 资源：对系统、人力和渠道资源大力投入
8 文化：全组织的业绩文化和创新文化



零售业务税前利润
亿元
14
128
零售业务营业收入[1]
亿元
131
358
零售业务经营费用
亿元
-118
-230
负债类收入
亿元
46
122
资产类收入
亿元
38
116
信用卡收入[1]
亿元
48
120
年均AUM
千亿元
5.5
11.8
AUM贡献率
0.8
1.0%
零售贷款平均余额
千亿元
2.1
4.0
资产减值占贷款余额比例
百分比
24
14%
网点平均零售AUM
亿元
6.6
9.1
年均网点数
个
829
1,301
净利息收益率
百分比
2.3
3.3%
客户经理人均客户人数
人
176
204
网点平均客户经理数
人/网点
1.5
1.8
贵宾客户人均AUM
万
155
169
贵宾AUM/总AUM
62
70%
贵宾客户的新增和流失
指数，2015年
100
41
(10)
131
贵宾客户持有产品数量
个
3.0
4.0
贵宾核心产品渗透率
保险
0.5
8.0%
基金
12.4
30.0%
1 "零售业务营业收入"已扣除"零售业务资产减值"

[illegible]

[illegible]

[illegible]

[illegible]5 [illegible]IT[illegible]


欧洲某领先零售银行概览
更新至2012年末
基本情况
全球客户（万） ~3,000
全球网点（个） ~3,000
业务分布（#个国家） 8~10
收入和业务组成
收入（亿欧元） ~100
存款类业务（亿欧元） ~2,500
贷款类业务（亿欧元） ~2,000
通过整合的运营与IT平台管理全球多个国家的零售银行业务体系
运营集中、功能全面
通过一套系统整合了各子业务板块和区域银行的全部业务
实现了零售银行全部业务模块的集成
技术领先、界面友好
启用当代最先进的IT平台，从旧系统平稳过渡
体现标准化、低成本的运作模式
界面友好，简单易用，高度自动化
持续五年的高额投资
亿欧元
3.0
4.0
9.0
16.0
2011
12
...
2016
显著的年度回报
亿欧元
2.0
5.0
11.0
2011
12
...
2016

[illegible]

□□□□□□□□□□□□□□□□□□□□IT□□□□□□□□□□□□□□□□□□□□□□□□□□□3-
5□□□□□□□□□□□□□□□□□□□□□□□□

[illegible]

[illegible]“[illegible]”[illegible]“[illegible]”[illegible]“[illegible]”[illegible]

[illegible]3-5[illegible]

[illegible]“[illegible]”[illegible]“[illegible]”[illegible]

[illegible]

[illegible]IT[illegible]5[illegible]IT[illegible]16[illegible]130[illegible]IT[illegible]1200[illegible]IT[illegible]

[illegible]1-2[illegible]3-4[illegible]“[illegible]”[illegible]+[illegible]“[illegible]”[illegible]

[illegible]18-24[illegible]

[illegible]3[illegible]“[illegible]”[illegible]KPI[illegible]

[illegible]

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[illegible]©2013[illegible]

MGI□□

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Jonathan Woetzel□□□□

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3/4□□□□□□□□□□□□□8000□□□□□□□2025□□□□□7000□□□□□□□□□□
□□□□□1□——□□□□40%□□□□□□

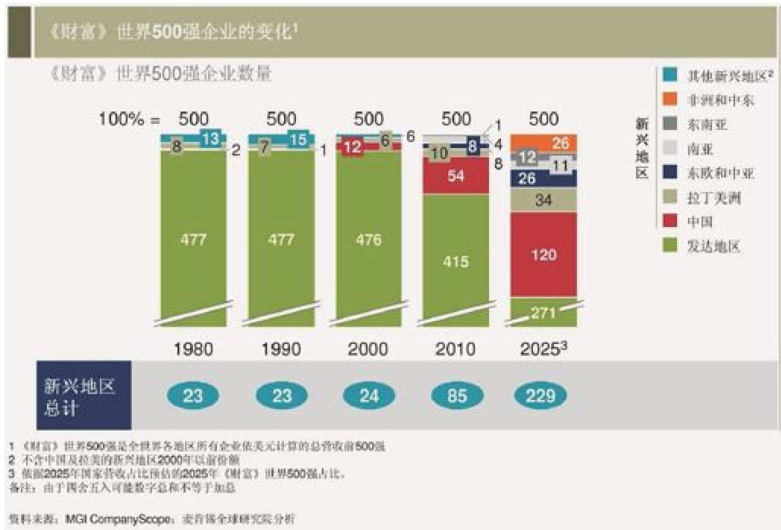
□1　□□□□□□□□□□□□□□□□□□□□



□□□
□□□□□□□□□□□100□□□□□□□□□□50%□GDP□□□□□□□□□□□□□□□□□□
□□□□□□□□□□□□□□□□□MGI□□□□□□□□□□□□57□□□□□□□□□□□□□□□□□
□GDP□9□□□□□□□□□□□□□2025□□□□□□□□□□□□□□□□□□□130□□□□□□□□

□□□□“□□□500□”□□□□□□□□□□□□□□□1980□□2000□□□□□□□□
□□□□□□□□□□□□□□□5%□□□□□□□□□2010□□17%□□2013□□□□
26%□□□□□□□□□□□□□□□□□□□2025□□□□□□□“□□□□500□”□□□□□□□
□45%□□□2□□□□□□□□□□120□□□□

□2　□□2025□□□□□□□500□□□□230□□□□□□□□2010□□85□□


《财富》世界500强企业的变化[1]
《财富》世界500强企业数量
100% =
500
1980
1990
2000
2010
2025[3]
新兴地区
其他新兴地区[2]
非洲和中东
东南亚
南亚
东欧和中亚
拉丁美洲
中国
发达地区
新兴地区总计
23
23
24
85
229
1 《财富》世界500强是全世界各地区所有企业依美元计算的总营收前500强
2 不含中国及拉美的新兴地区2000年以前份额
3 依据2025年国家营收占比预估的2025年《财富》世界500强占比。
备注：由于四舍五入可能数字总和不等于加总
资料来源：MGI CompanyScope；麦肯锡全球研究院分析

1.[illegible]

[illegible]B2B[illegible]——[illegible]——[illegible]

2.[illegible]

[illegible]

[illegible] 13 [illegible] WEG [illegible]

3.[illegible]

[illegible]General Electric[illegible]Caterpillar Group[illegible]Unilever[illegible]Embraer[illegible]

[illegible]

[illegible]20[illegible]1/3[illegible]5[illegible]1/5[illegible]2025[illegible]150[illegible]

[illegible]10[illegible]2300[illegible]

[illegible]http[illegible]//www.mckinsey.com/insights/mgi

[illegible]Richard Dobbs[illegible]Jaana Remes[illegible]Sven Smit[illegible]James Manyika[illegible]Yaw Agyenim-Boateng[illegible]

Jonathan Woetzel[illegible]MGI[illegible]

[illegible]

[illegible]

Heang Chhor，Richard Dobbs，Doan Nguyen Hansen

[illegible]

[illegible]2013[illegible]6[illegible]5[illegible]-7[illegible]——[illegible]——[illegible]0.2%[illegible]——[illegible]

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[illegible]1 [illegible]GDP[illegible]



[illegible]2 [illegible]2030[illegible]2000[illegible]



[illegible]

[illegible]38[illegible]25[illegible]1300[illegible]2500[illegible]52%[illegible]

[illegible]46[illegible]90%[illegible]

[illegible]

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Heang Chhor[illegible]

Richard Dobbs[illegible]MGI[illegible]

Doan Nguyen Hansen[illegible]

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[illegible]

Michael Chui[illegible]Diana Farrell[illegible]Steve Van Kuiken

[illegible]3[illegible]

[illegible]3[illegible]

[illegible]1 [illegible]3-5[illegible]



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Michael Chui[illegible]

Diana Farrell[illegible]

Steve Van Kuiken[illegible]

21[illegible]

[illegible]·[illegible]

[illegible]2006[illegible]·[illegible]Alan Mulally[illegible]

[illegible]

2006[illegible]·[illegible]103[illegible]——127[illegible]7[illegible]2009[illegible]Rik Kirkland[illegible]“[illegible]”[illegible]Rik Kirkland[illegible]

[illegible]

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[illegible]“[illegible]”[illegible]“[illegible]”[illegible]

[illegible]43[illegible]

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[illegible]·[illegible]

[illegible]·[illegible]·[illegible]——[illegible]——[illegible]——[illegible]

[illegible]

[illegible]©2013[illegible]

2014[illegible]

Gordon Orr

Gordon Orr[illegible]
[illegible]2014[illegible]

1[illegible]

[illegible]10%[illegible]

[illegible]

[illegible]

[illegible]

2[illegible]CIO[illegible]

[illegible]IT[illegible]

[illegible]CIO[illegible]2014[illegible]CIO[illegible]IT[illegible]IT[illegible]CIO[illegible]

3[illegible]

[illegible]

[illegible]2013[illegible]2013[illegible]iPhone 5S[illegible]5C[illegible]

[illegible]B2B[illegible]

4[illegible]

[illegible]5000[illegible]

5

6[illegible]

[illegible]2007[illegible]25[illegible]2013[illegible]130[illegible]15[illegible]——[illegible]9000[illegible]5592[illegible]2015[illegible]“[illegible]”[illegible]

7[illegible]

[illegible]2013[illegible]2013[illegible]11[illegible]2012[illegible]2012[illegible]1.7[illegible]2013[illegible]6[illegible]

2014[illegible]

8[illegible]

[illegible]2013[illegible]50%[illegible]2014[illegible]50%[illegible]

[illegible]

9[illegible]

2013[illegible]9[illegible]10[illegible]2014[illegible]

10[illegible]

[illegible]2013[illegible]“[illegible]”[illegible]

[illegible]2013[illegible]

[illegible]“[illegible]”[illegible]“[illegible]”[illegible]20%[illegible]2004[illegible]13%[illegible]9%[illegible]2012[illegible]2013[illegible]26%[illegible]29%[illegible]7%[illegible]“[illegible]”[illegible]

[illegible]“[illegible]”[illegible]

Gordon Orr[illegible]

2008[illegible]

2009[illegible]

2010[illegible]

2011[illegible]2011[illegible]

2012[illegible]

2013[illegible]

[illegible]1[illegible]
[illegible]19[illegible]
[illegible]100020
[illegible]86-10[illegible]6561-3366
[illegible]86-10[illegible]8529-8038

[illegible]3[illegible]
[illegible]40[illegible]

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□□□□852□2845-9985
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□□□□□□□□□□
□□□□□□233□
□□□□17□
□□□200020
□□□□86-21□6385-8888
□□□□86-21□6386-2000
□□
□□□□□□□□□□
□□□□□□□□□□47□
□□□110
□□□□886-2□8758-6700
□□□□886-2□8758-7700